



## Welcome to Financial Security Management, Inc.

FSM is a comprehensive financial services firm dedicated to offering ethical and professional guidance to each of our clients. We believe that financial planning is built first and foremost on quality client relationships that last throughout each stage of life. By offering financial portfolio management, tax planning, and real estate services all in one location; we are able to tailor personal financial plans with our clients to help them reach their financial goals. With over 100 years of combined experience, our committed team members are here to listen and to serve.

Doing Well by Doing Right

SEC Investment Adviser Report

### QUICK LINKS

- [Map to Our Location](#)
- [Tax Resources](#)
- [FSM Tax Organizer](#)
- [FSM Orion Client Portal](#)
- [Managed Account Access - Schwab](#)



## Financial Security University Nights

We are excited to be offering new opportunities to broaden your knowledge through Financial Security University. Once a month we will be hosting free educational seminars to our clients and their guests on a variety of topics. 2019 FSU Schedule

[➤Register Here](#)

### Summer 2019!

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#### Estate Planning Basics

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#### Long Term Care

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#### 401k Allocations

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### Financial Planning

- Retirement Planning
- Personal Investment Advising
- Debt Reduction
- Financial Education
- Budgeting Assistance
- College Savings

### Tax Services

- Tax Preparation & Planning
- Small Business Consulting
- Audit Representation

### Portfolio Management

- Goals Based Portfolio Development & Monitoring
- Financial Plans
- 401k Rollovers
- IRA & Roth IRA Investing

## Real Estate

- Buy or Sell a Home
- Investment Properties
- Property Management

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Who We Are

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Products & Services

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Client Resources

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Contact Us

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Home

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